

Planning and Analysis

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January 1988

Residential, commercial, and industrial sales increased in January, 1988 compared with last year. Total utility sales were up from 1,462.6 trillion Btu in January, 1987 to 1,607.8 trillion Btu in January, 1988. Transportation volumes to end-users were up 22.8 percent compared with last year.

GAS UTILITY VOLUMES TO ULTIMATE CONSUMERS (Trillions of Btu)

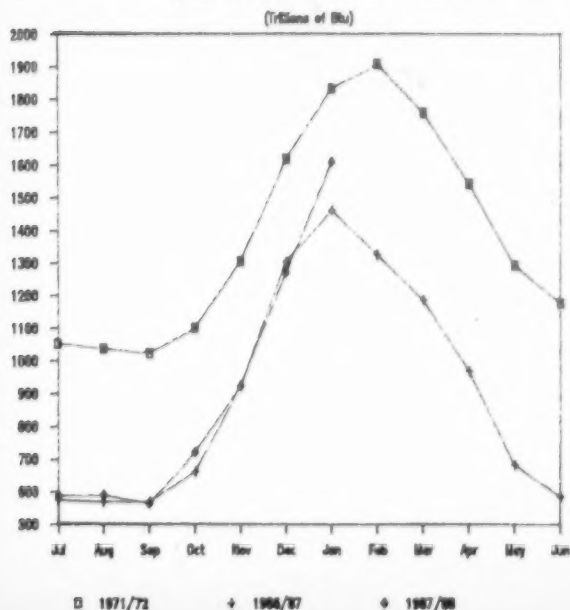
	January			Heating Season (Nov-Jan)		January 1 to December 31		
	1988	1987	%Change ¹	1988	(% Change) Last Period	1988 Forecast ²	1987 ^P	% Change
Residential	870.2	758.1	+ 14.8	1,875.4	+ 5.6	4,542.3	4,395.6	+ 3.3
Commercial	381.2	344.7	+ 10.6	849.5	+ 0.5	2,289.7	2,169.7	+ 5.5
Industrial*	257.4	248.4	+ 3.6	682.4	- 4.7	2,267.0	2,258.0	+ 0.4
Elec. Gen.	78.4	95.0	- 17.4	335.7	+ 10.6	1,849.5	1,866.1	- 0.9
Other	20.6	16.4	-	57.7	-	157.1	179.6	-
Total Sales	1,607.8	1,462.6	+ 9.9	3,800.7	+ 2.9	11,105.6	10,869.0	+ 2.2
Transportation*	306.6	249.6	+ 22.8	904.9	+ 37.5	3,394.9	3,337.9	+ 1.7
Total Volumes	1,914.4	1,712.2	+ 11.8	4,705.6	+ 8.2	14,500.5	14,206.9	+ 2.1**
Degree Days***	1,016	932	+ 9.0	2,312	- 1.2			

*Significant industrial sales volumes have been displaced by transportation volumes.

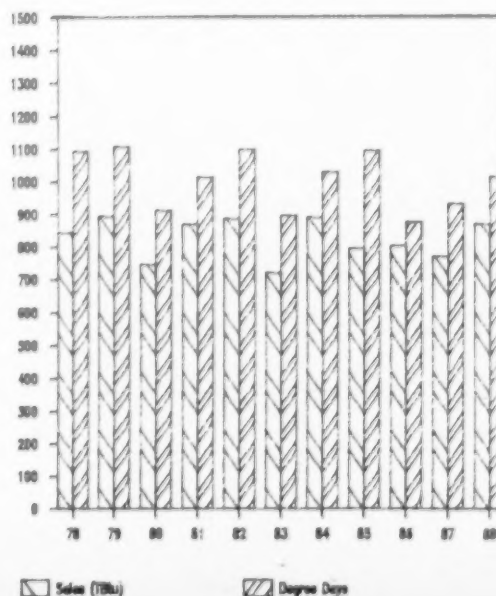
**No direct comparison with EIA consumption figures should be made.

***Source: NOAA (Weighted by Gas Homeheating Customers - Normal for January is 977).

TOTAL MONTHLY GAS UTILITY SALES



JANUARY RESIDENTIAL GAS UTILITY SALES



RESIDENTIAL APPLIANCE SHIPMENTS - JANUARY

(Thousands of Units)

	1988	1987	% Change '87 vs. '88
Domestic Ranges - Gas	153.7	180.3	- 14.8
- Electric	235.4	281.1	- 16.3
Clothes Dryers - Gas	91.9	93.2	- 1.4
- Electric	320.8	341.7	- 6.1
Water Heaters - Gas	354.8	345.8	+ 2.6
- Electric	282.5	287.0	- 1.6
Warm Air Furnaces-Gas	157.2	168.4	- 6.6
- Electric	27.7	31.4	- 11.8
- Oil	15.1	16.2	- 6.8
Boilers - Gas	13.2	12.6	+ 4.8
- Electric	0.1	0.1	- 51.0
- Oil	10.1	9.2	+ 9.1

Source: Gas Appliance Manufacturers Association (GAMA).
Association of Home Appliance Manufacturers.

SPOT PRICES TO GAS DISTRIBUTION COMPANIES
(January 1988)

Receipt Point	Price (\$/MMBtu) ^a
Northeast	\$2.44
Southeast	\$2.56
Midwest	\$2.20
Southwest	\$2.02
Total	\$2.36

Source: American Gas Association

^aRepresents average price paid at receipt point for a one-month contract.

ECONOMIC INDICATORS - JANUARY

	1988	1987	% Change '87 vs. '88
Total Actual Private Housing Starts (Thous. of units)	78.5	105.1	- 25.3
Consumer Price Index (All urban, unadjusted, 1982 - 1984 = 100)			
Gas (utility pipe gas)	93.7	96.5	- 2.9
Electricity	107.9	106.4	+ 1.4
Fuel Oil	79.6	72.8	+ 9.3

Source: Department of Commerce, Bureau of Labor Statistics

Index Total Gas Sales (1972 = 100)	87.7	79.8	+ 9.9
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Gas Utility Prices (\$/MMBtu)			
Residential	4.92	5.14	- 4.2
Commercial	4.63	4.78	- 3.3
Industrial	3.40	3.44	- 1.2
Electric Generation	2.49	2.34	+ 6.5
Total	4.47	4.57	- 2.2

Carriage Volumes ³ (Trillions of Btu)			
To Ultimate Consumers	306.6	249.6	+ 22.8
For Ultimate Consumers	90.8	90.8	- 0.1
For Resale	359.6	407.1	- 11.7
Total	757.0	747.5	+ 1.3

Source: American Gas Association

AVERAGE GAS UTILITY PRICES FOR THE 12 MONTH PERIOD ENDING
(\$/MMBtu)

Year	Month	Total	Res.	Comm.	Ind. Only	Elec. Gen.	Other
1979	Dec.	2.522	2.918	2.665	2.261	2.120	1.937
1980	Dec.	3.134	3.612	3.336	3.184	2.651	2.667
1981	Dec.	3.650	4.161	3.909	3.311	3.241	3.458
1982	Dec.	4.456	4.969	4.721	3.969	4.090	4.303
1983	Dec.	5.120	5.882	5.508	4.486	4.198	4.921
1984	Dec.	5.128	5.938	5.511	4.410	4.222	4.869
1985	Dec.	5.017	5.953	5.441	4.248	3.812	4.791
1986	Dec.	4.601	5.651	5.034	3.649	2.726	4.024
1987 ^P	Jan.	4.545	5.600	4.967	3.577	2.647	3.987
	Feb.	4.506	5.547	4.910	3.525	2.644	3.905
	Mar.	4.466	5.502	4.856	3.492	2.628	3.862
	Apr.	4.426	5.461	4.819	3.460	2.614	3.790
	May	4.401	5.446	4.802	3.435	2.578	3.754
	Jun.	4.388	5.444	4.799	3.413	2.551	3.758
	Jul.	4.375	5.440	4.792	3.392	2.550	3.693
	Aug.	4.363	5.436	4.788	3.377	2.548	3.668
	Sep.	4.354	5.434	4.784	3.365	2.543	3.657
	Oct.	4.338	5.414	4.758	3.352	2.540	3.616
	Nov.	4.318	5.394	4.751	3.337	2.535	3.589
	Dec.	4.310	5.381	4.749	3.331	2.537	3.536
1988 ^P	Jan.	4.299	5.333	4.723	3.327	2.547	3.489

AVERAGE MONTHLY GAS UTILITY PRICES
(\$/MMBtu)

Year	Month	Total	Res.	Comm.	Ind.& Elec.	Ind. Only	Elec. Only
1986	Jan.	4.95	5.44	5.20	3.93	4.06	3.48
	Feb.	4.95	5.50	5.19	3.84	4.06	2.94
	Mar.	4.81	5.49	5.15	3.59	3.84	2.76
	Apr.	4.68	5.76	5.21	3.38	3.70	2.61
	May	4.49	6.04	5.18	3.24	3.51	2.73
	Jun.	4.29	6.49	5.11	3.10	3.47	2.58
	Jul.	4.11	6.56	4.95	3.01	3.36	2.61
	Aug.	4.12	6.80	4.90	3.01	3.30	2.65
	Sep.	4.11	6.47	4.81	3.02	3.32	2.68
	Oct.	4.40	6.23	4.94	3.09	3.38	2.59
	Nov.	4.51	5.50	4.77	3.23	3.52	2.61
	Dec.	4.55	5.15	4.72	3.34	3.59	2.75
1987 ^P	Jan.	4.57	5.14	4.78	3.13	3.44	2.34
	Feb.	4.66	5.17	4.80	3.42	3.64	2.87
	Mar.	4.45	5.14	4.70	3.12	3.55	2.55
	Apr.	4.22	5.27	4.75	2.91	3.35	2.51
	May	4.09	5.76	4.89	2.74	3.15	2.34
	Jun.	4.04	6.48	5.06	2.70	3.13	2.34
	Jul.	3.87	6.42	4.75	2.79	3.06	2.58
	Aug.	3.92	6.66	4.81	2.84	3.09	2.62
	Sep.	3.94	6.44	4.72	2.83	3.12	2.61
	Oct.	4.15	5.74	4.50	2.93	3.22	2.53
	Nov.	4.28	5.27	4.69	3.02	3.37	2.53
	Dec.	4.48	5.05	4.70	3.29	3.56	2.77
1988 ^P	Jan.	4.47	4.92	4.63	3.19	3.40	2.49

Editor - Carole Williams-Hopkins (703/841-8507)

¹Gas volumes are based on, and the percent change is a function of, the 69 sample companies whose sales constitute about 65% of total gas utility sales to ultimate consumers. The peak year in total sales for the gas utility industry occurred in 1972.

²1988 forecasts for the residential and commercial sectors are based on available 1988 monthly data with the remaining months derived by using a four year average. The industrial sector forecast (industrial only, electric generation, and transportation) is also based on available 1988 monthly data with the remaining months of 1988 heavily weighted by last years volumes with no adjustment made for degree days.

³Carriage volumes determined by using a simple straight expansion of sample data to represent the total gas utility industry. Carriage volumes for ultimate consumers are volumes owned by the ultimate consumer but delivered to another transporter, not the ultimate consumer, and are therefore broken out to eliminate double counting of volumes delivered to ultimate consumers.

P-Preliminary.